

Integrating Microsoft Dynamics CRM 4.0 and Microsoft Office SharePoint Server 2007

Course Code: MS80141 One Day; Instructor-Led

Introduction

This one-day instructor-led training course is intended to teach students the basic skills required to create integrated applications that utilize data and features from both Microsoft Dynamics CRM 4.0 and Microsoft Office SharePoint Server 2007. Students attending this course will:

- Learn to compare and contrast the two products, clarifying which business problems each is best suited to solve.
- Learn about common integration scenarios, and to design, plan and build solutions that integrate the two products.
- Be able to build customized Microsoft Dynamics CRM 4.0 applications that expose data and content stored within SharePoint sites, lists and libraries.
- Learn how to build SharePoint applications that provide reporting solutions based on Microsoft Dynamics CRM 4.0 data, utilizing core Windows SharePoint Services 3.0 functionality.
- Learn to build data-aware applications utilizing features of Microsoft Office SharePoint Server 2007, integrating data from Microsoft Dynamics CRM 4.0.
- Gain an introduction to fundamental .NET programming techniques required to extend integrated Microsoft Dynamics CRM 4.0 and SharePoint applications.

Audience

This one-day course will be appropriate for the following audiences:

- Business analysts and solution designers.
- Power-users and customizers.
- .NET developers who need an introduction to Dynamics CRM and SharePoint integration techniques
- Microsoft Certified Trainers

At Course Completion

After completing this course, students will be able to:

- Understand basic positioning of SharePoint and Microsoft Dynamics CRM, and the kinds of business problems each is designed to solve.
- Identify the most common scenarios where SharePoint and Dynamics CRM can be used together.
- Learn basic Microsoft Dynamics CRM customization techniques required to build integrated applications.
- Learn how to use a static URL for a Microsoft Dynamics CRM record to display associated content stored in SharePoint.
- Learn how to construct a URL dynamically, based on information contained in a Dynamics CRM record, and display associated content stored in SharePoint.
- Understand and Work with SharePoint Web Parts and Pages.
- Understand and Use the List Web Part for Microsoft Dynamics CRM 4.0.
- Understand and Use SharePoint Designer Data Views to Expose Microsoft Dynamics CRM 4.0 Data.
- Understand how to use the Business Data Catalog with data From Microsoft Dynamics CRM 4.0 Filtered Views.
- Understand how to configure, publish, and view Excel spreadsheets using Excel Services.
- Overview the Web Parts available for the Business Data Catalog and Excel Services to allow views of Microsoft Dynamics CRM 4.0 data to be accessible on a SharePoint dashboard.
- Understand the basics of calling the Dynamics CRM 4.0 Web Services from a SharePoint ASP.NET page.

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Prerequisites

Before attending this course, students must:

- Be familiar with the material covered in the Dynamics CRM Applications course, (M8913).
- Be familiar with basic use of SharePoint sites, lists and document libraries.
- Have some familiarity with basic customization techniques in either Microsoft Dynamics CRM 4.0 (e.g., customizing forms and attributes), or SharePoint (creating custom pages and working with web parts).

Course Outline

Module 1: Introduction and Overview

This chapter teaches you which scenarios are best suited for each platform, what the comparative strengths of each are in different application scenarios, and how to build applications that integrate features from both SharePoint and Microsoft Dynamics CRM 4.0.

Lessons

- The Right Tool for the Job
- Common Integration Scenarios

After completing this module, students will be able to:

- Understand basic positioning of SharePoint and Microsoft Dynamics CRM, and the kinds of business problems each is designed to solve.
- Identify the most common scenarios where SharePoint and Dynamics CRM can be used together.

Module 2: Extending Microsoft Dynamics CRM 4.0 with data from SharePoint

This chapter teaches basic Microsoft Dynamics CRM 4.0 customization concepts and skills, and focuses on extending the highly structured data characteristic of Microsoft Dynamics CRM with related but less structured data often stored in SharePoint.

Lessons

- Microsoft Dynamics CRM 4.0 Customization Basics
- Extending Microsoft Dynamics CRM Using IFRAMEs with Static URLs
- Extending Microsoft Dynamics CRM Using IFRAMEs with Dynamic URLs

Lab : Search for SharePoint for Information related to a Microsoft Dynamics CRM 4.0 Account Record.

- Customize the Account Entity Form
- Add a Tab
- Add an IFRAME
- Add code for the onload event

After completing this module, students will be able to:

- Learn basic Microsoft Dynamics CRM 4.0 customization techniques required to build integrated applications.
- Learn how to use a static URL for a Microsoft Dynamics CRM 4.0 record to display associated content stored in SharePoint.
- Learn how to construct a URL dynamically, based on information contained in a Microsoft Dynamics CRM 4.0 record, and display associated content stored in SharePoint.

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Module 3: Consume Microsoft Dynamics CRM 4.0 Data from Windows SharePoint Services 3.0

This chapter introduces Windows SharePoint Services 3.0 (WSS) customization features, such as pages and web parts, which can be used to expose Microsoft Dynamics CRM 4.0 data in WSS. This is primarily used for building reports, and it relies on features available in Windows SharePoint Services 3.0.

Lessons

- Understanding and Working with SharePoint Web Parts and Pages
- Understanding and Using the List Web Part for Microsoft Dynamics CRM 4.0
- Understanding and Using SharePoint Designer Data Views to Expose Microsoft Dynamics CRM 4.0 Data

Lab : Working with the Microsoft Dynamics CRM 4.0 List View Web Part

- Create the AccountContacts.aspx Web Part page
- Add the Initial Microsoft Dynamics CRM 4.0 Web Part to display Active Accounts
- Change the display of the Microsoft Dynamics CRM 4.0 Web Part with Active Accounts
- Add the Related Microsoft Dynamics CRM 4.0 Web Part to display Contacts

After completing this module, students will be able to:

- Understand the Concept of WSS Web Part Pages and Web Parts.
- Be introduced to the SharePoint List View Web Parts for Microsoft Dynamics CRM 4.0.
- Understand and use SharePoint Designer to create Data Views that Access Dynamics CRM 4.0 Data.

Module 4: Building Data-Aware Applications Using Microsoft Office SharePoint Server 2007

This chapter explains Microsoft Office SharePoint Server 2007 features that can integrate with Microsoft Dynamics CRM 4.0, focusing on the Business Data Catalog and Excel Services.

Lessons

- Understanding and Using the Business Data Catalog with Microsoft Dynamics CRM 4.0.
- Understanding and Using Excel Services
- Building a MOSS 2007 Dashboard using Microsoft Dynamics CRM 4.0 Data

After completing this module, students will be able to:

- Understand how to use the Business Data Catalog with data From Microsoft Dynamics CRM 4.0 Filtered Views.
- Understand how to configure, publish and view Excel spreadsheets using Excel Services.
- Overview the Web Parts available for the Business Data Catalog and Excel Services to allow views of Microsoft Dynamics CRM 4.0 data to be accessible on a SharePoint dashboard

Module 5: Advanced Integration Scenarios

This chapter introduces several advanced integration scenarios for Microsoft Dynamics CRM 4.0 and Windows SharePoint Services integration.

Lessons

- Building a Basic Web-to-Lead ASP.NET Page

Lab : Building a Web-to-Lead Application

- Create the initial WebToLead.aspx page in SharePoint Designer.
- Allow for code blocks in your custom site page.
- Create the Microsoft Dynamics CRM 4.0 .NET dll
- Test the Page and receive a permission error.
- Check for the newly created Lead in Microsoft Dynamics CRM 4.0

After completing this module, students will be able to:

- Understand the basics of calling the Dynamics CRM 4.0 Web Services from a SharePoint ASP.NET page